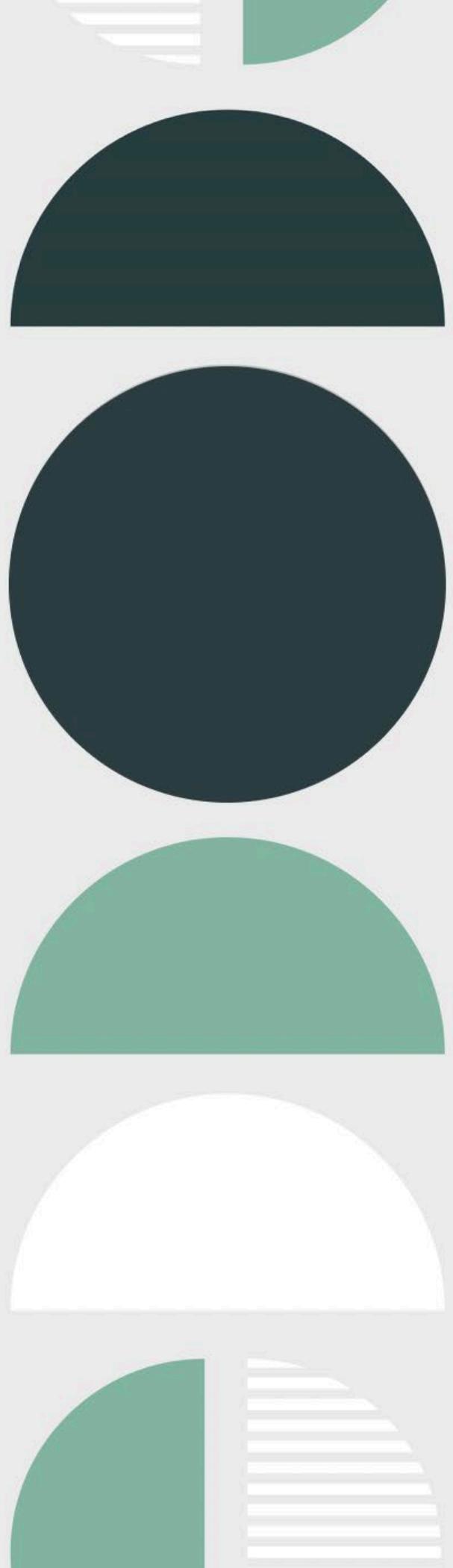


Build a performance management approach for ServiceNow

Developed by the ServiceNow Best Practice Center of Excellence

January 2021



What is performance management?

Here's how ServiceNow® defines performance management: the approach of using metrics to inform strategic decisions, guide day-to-day work, and track progress toward defined goals. It involves defining two different types of metrics: those that measure performance against a defined goal and those that give insight into progress and risks. For your performance management efforts to be successful, you must make sure you communicate the relevant metrics are conveyed to appropriate stakeholders—this way, you'll be able to take timely corrective steps as needed.

Why should I invest in topic?

Organizations that use performance management effectively are more likely to achieve and exceed their goals because they:

- Provide stakeholders with the data they need to prioritize their work and inform strategic decisions
- Define and communicate metrics that help all stakeholders understand what the organization is trying to achieve and how
- Track performance and progress toward goals to identify opportunities to increase the business benefits they can deliver with ServiceNow and course-correct when needed

What will this workbook help me do?

This Success Workbook explains the steps to build an effective performance management approach for ServiceNow. You'll find guidance on how to:

- Understand your organizational context for measuring ServiceNow performance
- Define key performance indicators (KPIs) for measuring performance against your business goals, ServiceNow adoption goals, and platform health goals
- Create custom dashboards that stakeholders can use to make informed decisions



How to use this Success Workbook

This workbook will guide you through the steps to get started with ServiceNow governance.

Start by reading through the [Workbook Checklist](#) and review the steps and tasks to get started with ServiceNow governance. From the checklist page, you can either proceed through the workbook page by page or navigate only to the sections that you need using the hyperlinks.

Each section includes “check your progress” questions that you can answer to test whether you need to complete the tasks listed on that page or if you've already done so and should move forward. Hyperlinks are included throughout the workbook so you can navigate back and forth between the checklist page and different sections.



Workbook Checklist: Build a performance management approach for ServiceNow

Step 1: Understand your organizational context for measuring ServiceNow performance

- [Understand the business outcomes ServiceNow will help you achieve](#)
- [Understand the performance measurement needs the of stakeholder groups involved in achieving those business outcomes](#)

Step 2: Define metrics to measure ServiceNow performance

- [Define KPIs to measure the expected business outcomes from ServiceNow](#)
- [Define KPIs to measure ServiceNow adoption](#)
- [Define KPIs to measure Now Platform health](#)

Step 3: Build ServiceNow performance dashboards

- [Build performance dashboards using ServiceNow Performance Analytics](#)



Step 1a: Understand the business outcomes ServiceNow will help you achieve

Your ServiceNow performance metrics must align with the business outcomes (the measurable business benefits, in other words) that your organization expects the ServiceNow implementation to help achieve. This requires a good understanding of your organization's strategic vision, business outcomes required to achieve the organization's strategic vision, and the ServiceNow implementation plan for delivering those business outcomes.

Check your progress:

- Do you understand your organization's strategic vision and priorities?
- Do you know what measurable business benefits (or business outcomes) your organization expects to achieve by implementing ServiceNow?
- Can you articulate how the ServiceNow implementation plan aligns with the organization's vision on a single page?

If you answered "yes" to both questions above, proceed to the [next step](#). If not, complete these action steps to complete this step:

1. Review the existing documents relevant to your ServiceNow implementation.

Start by reviewing all available documentation relevant for your ServiceNow implementation strategy and planning. This could include:

- **Documents on your organization's strategic vision and goals** – Look for organizational priorities and business transformation goals. For example, increasing the speed of IT operations might be a priority for your organization.
- **ServiceNow's [business case](#)** – Look for statements on business benefits ServiceNow helps achieve for your organization. For example, your business case might promise a 10% increase in IT speed within 18 months of implementing ServiceNow.
- **ServiceNow implementation plan** – Look for the ServiceNow solutions and capabilities planned for implementation and when they're planned for implementation. Your organization might be taking a phased approach to implement all relevant ServiceNow solutions to achieve the business benefits mentioned in the business case, for example.

2. Work with your ServiceNow platform team and senior stakeholders to get additional details.

Supplement the insight you gained from the step above by speaking with your organization's senior leaders and ServiceNow platform team.

Ask your [ServiceNow executive sponsor](#) and other senior leaders (who are investing in ServiceNow) these questions:

- What business outcomes do you want to achieve with ServiceNow? Example answer: We want to reduce our IT support costs.
- What are the current conditions? Example answer: Our costs are 10% above the industry benchmark.



- What problem or obstacles you face in achieving the business outcomes you stated above? Example answer: We're maintaining multiple service desks and tools (more than industry average). This creates challenges caused by depending on expert knowledge to resolve incidents.
- What future state do you envision reaching through ServiceNow? Example answer: We'll have rationalized our toolsets to a single source of truth and reduced our dependency on L2/L3 staffing.
- What success criteria defines whether we've accomplished the business outcome? Example answer: Our IT support costs will be at or below the industry median benchmark.

Ask your [ServiceNow platform team](#) these questions:

- What ServiceNow solutions have we planned to implement? Example answer: We're implementing Incident Management and Change Management for our US IT department. We plan to implement ITBM solutions next.
- What business outcomes will each ServiceNow solution help realize? Example answer: With Incident Management, we'll be able to decrease the mean time to resolve an incident by 10%.
- Do we have a phased implementation approach? If so, what is it and does it have an associated implementation roadmap? Example answer: Yes, we have a three-phase approach that's detailed in our roadmap.
- What interdependencies between the solutions should we consider as we work toward our expected business outcomes? Where do these dependencies occur in the implementation roadmap? Example answer: We need Problem Management implemented, along with Incident and Change Management, to achieve the business outcomes mentioned in our business case. We've planned to implement Problem Management during X phase of our roadmap.

3. Document your findings in a single vision-to-value statement.

Documenting your findings in a vision-to-value statement gives you a tool you can use to inform how you measure ServiceNow performance. Here's an example of what you need to document:

Vision <i>A high-level view of the organization's strategic goals</i>	Strategic drivers <i>An articulation of the organizational priorities to achieve the vision</i>	Business outcomes <i>Measurable business benefits senior stakeholders expect to realize with ServiceNow</i>	Measures of success <i>KPIs or metrics senior stakeholders use to measure the respective benefit</i>	ServiceNow solutions <i>ServiceNow solutions planned for implementation to help deliver on the expected business outcome</i>
Deliver a world-class IT service experience for employees, similar to the best consumer experience	•Enable faster and leaner IT service delivery	Improve issue resolution speed	Reduce the mean time to resolve incidents by 25%	Incident Management, Change Management, Problem Management
	•Improve the employee experience	Enable self-service and automation	Increase self-service use by 50%	Virtual Agent, Service Portal
		Improve process transparency and knowledge	Improve employee CSAT to 4.5/5	Now Mobile, Knowledge Management

Get the vision-to-value statement you create with your ServiceNow executive sponsor and your most critical stakeholders—including [process owners](#), service owners, and fulfillment team leaders (like service desk)—to build consensus on what business outcomes you'll measure performance against.

[Return to workbook checklist](#)

Step 1b: Understand the performance measurement needs of the stakeholder groups involved in achieving those business outcomes

There are multiple stakeholder groups involved in achieving the business outcomes your organization expects from the ServiceNow implementation. You need to identify the key stakeholder groups and understand how ServiceNow performance metrics can help inform their work and help them make better decisions. This information will ensure you select and communicate the right metrics effectively.

Check your progress:

- Do you know which stakeholder groups require information on ServiceNow performance?
- Do you have a clear understanding of what each stakeholder group needs metrics for?

If you answered "yes" to both questions above, proceed to the [next step](#). If not, complete these action steps to complete this step:

1. Identify key stakeholder groups that help achieve the business outcomes expected from your ServiceNow implementation.

Make a list of stakeholder groups that either work on ServiceNow or do work that is supported by/impacted by ServiceNow. Typically, the stakeholder groups for ServiceNow include:

Stakeholder group	Description
Senior Leaders (includes executive sponsor for ServiceNow)	These are business executives and functional leaders who either invest or are likely to invest in ServiceNow for their teams. The executive sponsor guides and oversees the vision for ServiceNow at your organization.
Platform Team (includes the platform owner for ServiceNow)	The platform owner and the platform team have the overall accountability for scaling and managing ServiceNow implementations across the organization.
Application, Service, or process owners	These are individuals responsible for managing an end-to-end application, service, or process on ServiceNow. They could be part of the central platform team, managing an enterprise-level application, or be within business-units that use ServiceNow within your organization.
Fulfillers or Front-line workers	These are the end-users who are using ServiceNow applications to fulfill their customer requests or deliver on their daily tasks.



2. Identify how each stakeholder group will or can use ServiceNow performance metrics.

Interview a representative(s) of each stakeholder group and find answers to the below questions:

- How is their work related to/dependent on ServiceNow?
- What types of decisions is the stakeholder responsible for?
- What ServiceNow data would inform those decisions?
- Are they interested in the ServiceNow performance on the business benefits the organization expects (e.g. cost savings)?
- Are they interested in ServiceNow platform adoption and health?
- Are they interested in specific ServiceNow application/module performance (e.g. Virtual Agent performance), or task/workflow performance (e.g. number of incidents closed)?

See below for a typical view into stakeholder needs and metrics usage.

Stakeholder group	Potential decisions to make and data required
Executive Sponsor and senior leaders	<p>Decisions to make:</p> <ul style="list-style-type: none"> •What should we prioritize as our next investment? •What it is required to mitigate areas of value leak? <p>Data required:</p> <ul style="list-style-type: none"> •An enterprise view of the business value and outcomes ServiceNow has helped realize. •Trend analytics over time for value realized •Comparison of value realized across functions and geographies •A view of application-level performance
Platform Owner or Platform Team	<p>Decisions to make:</p> <ul style="list-style-type: none"> •What should we prioritize as our next investment? •What it is required to mitigate areas of value leak? <p>Data required:</p> <ul style="list-style-type: none"> •ServiceNow platform adoption and maintenance data, across business-functions and geographies •Business value realized and outcomes achieved through ServiceNow
Application, Service, or process owners	<p>Decisions to make:</p> <ul style="list-style-type: none"> •How can we improve application/service/process performance? •How can further simplify the application/service/process? •How can we increase user satisfaction/value? <p>Data required:</p> <ul style="list-style-type: none"> •Performance on key user metrics or SLAs for the application/service/process. •Adoption and maintenance data for the application/service/process
Fulfillers or Front-line workers	<p>Decisions to make:</p> <ul style="list-style-type: none"> •What should I prioritize to do next? •What should I escalate? To whom? <p>Data required:</p> <ul style="list-style-type: none"> •Tasks that are high priority or need attention

Step 2a: Define metrics to measure business outcomes ServiceNow helps achieve

Once you have identified the business outcomes your organizations expects to achieve (see Step 1a) by implementing ServiceNow, you need to define a set of Key Performance Indicators (KPIs) that clearly indicate when an expected business outcome is achieved. The best ones are easy to track, have realistic targets associated with them, and are meaningful for all stakeholders involved.

Check your progress:

- Do you have KPIs defined that clearly indicate when you have fulfilled an expected business outcome?
- Do all KPIs have targets defined that stakeholders agree with?
- Have stakeholders defined thresholds to inform when an action is required?

If you answered “yes” to both questions above, proceed to the next step. If not, complete these action steps to complete this step:

1. Identify top 3 KPIs to track expected business outcome.

Select no more than three KPIs to measure performance on each business outcome your organization expects to realize from ServiceNow. Ensure that these KPIs:

- Capture the most important benefits (e.g. process improvements or cost savings) expected
- Clearly indicate the exact activity/process you are measuring
- Have agreement among stakeholders as the best indicators of success
- Have a consistent definition across stakeholder groups (i.e. all stakeholders interpret it in the same way and use a consistent method to measure it)

Below are examples of KPIs ServiceNow customers typically use:

	IT	Human Resources	Customer Service
Business outcomes	Modernize IT service management	Faster onboarding experience	Customer service issues resolved fast
KPIs	Fewer incidents caused by changes	Faster new hire time to productivity	Reduced average case-handling time
	Faster MTRR	Faster time to complete compliance requirements	Improved customer and agent satisfaction
	Faster IT request delivery	Annual attrition rate	Improved self-service adoption

Refer to the Success Template: [Top value KPIs used by ServiceNow customers](#) for additional examples, and measurement guidelines.



2. Set a baseline comparison for each KPI.

You need to set a baseline to provide the measurement that you will compare future results against. In the absence of a clear baseline, use historical data or work with stakeholders close to the processes involved to define a current value and treat that as a baseline for your metric. For example, let's say your KPI is to reduce your mean time to resolution (MTTR). Use the following approaches to set a baseline:

- If you have a current MTTR captured, use that as your baseline.
- If you don't have current MTTR readily available, you are likely to have access to some data on number of incidents open/close over the last six to twelve months. Use this data to determine an acceptable current value for use as a baseline.
- If you have absolutely no data collected in past, work with fulfillers and helpdesk managers to come-up with some rough estimates of current performance. Use this estimate as the baseline.



Note that the goal here is *not* to have a perfect baseline. The goal is to have something that is reasonable, credible, and acceptable to stakeholders.

3. Define targets for each KPI.

You must have time-bound goals or targets defined for every KPI you track for ServiceNow. Set targets based on what you learned business benefits stakeholders expect from ServiceNow (step 1a). In the absence of an expected value, work with process owners and service owners to define an initial, reasonable target. Refine the target based on stakeholder feedback as you continue to track and report on the KPIs.

If your organization has a phased implementation plan for ServiceNow, consider having a separate target set for each phase of your implementation and the target for the next phase, based on performance at the end of each phase.



Make your KPIs SMART. As you work to define the right targets and thresholds for your ServiceNow KPIs, look for opportunities to make your KPIs SMART. Where SMART stands for:

- **Specific** – The KPI must clearly specify what you want to achieve.
- **Measurable** – The KPI must be measurable with a set target.
- **Actionable** – The KPI should have a clear owner who can make the required decisions and take actions to achieve the KPI.
- **Relevant** – The KPI should be relevant to the overarching business goal. It should answer why it's important.
- **Timebound** – The KPI must include a deadline, a defined timeline for when you want to achieve the goal by.

Examples of a SMART KPI targets:

"40% reduction in touch points to manage incidents within 18 months."

"Reduce the cost of asset management by 15% within a year."

4. Identify leading indicators to measure progress on your KPIs.

You must define [leading indicators](#) to track progress on underlying activities/milestones required to achieve the KPI targets. These metrics provide an advance notice about how likely you are to meet the KPI targets, so you can prioritize the right activities and take course correction steps to meet or exceed your goals.

Work with your process and service owners to define leading indicators to track progress against each KPI. Use the below questions to get started:

- What short-term activity milestones are critical in realizing the KPIs? *For example: % of process users trained on ServiceNow is critical to increase the average number of unique users on ServiceNow applications*
- Would tracking the short-term activity provide enough information to course correct in future if performance is poor? *For example: % reduction in the time it takes to resolve incidents measures changes in how long it takes the incident management process to flow from end to end, but what do you do if this time isn't going down? Defining additional leading indicators like reduction in number of touch points to manage incidents or average amount of time spent at each touch point provides easily measurable indicators that can inform what's preventing expected KPI performance.*
- What other metrics should we track to predict and influence performance on the KPI?

Here are additional examples of KPIs and associated [leading indicators](#):

	KPIs (lagging indicators)	Leading indicators
Information technology	Fewer incidents caused by changes	# of changes per week or month # of unscheduled changes % of tests completed per change on average
	Faster MTTR	Incident/Problem/Request average response time Average close time of incidents/problem/requests Average resolution time of incidents/problem/requests Number of incidents/problem/requests closed per agent per week # of incidents/problem/requests resolved on first contact % of incidents/problem/requests closed same day opened % of incidents/problem/requests resolved on first contact
	Shift work left to a lower and more cost-effective service tier	% of open incidents/problem/requests that were escalated Number of knowledge articles marked helpful
Human resources	Faster new hire time to productivity	Satisfaction ratings for new hire onboarding trainings Completion rate for new hire training Average time to provide all equipment Average time to complete all legal and compliance requirements Average time to conduct background checks
	Faster time to complete compliance requirements	Number of vendors % of vendors with completed training
	Annual attrition rate	Overall employee satisfaction ratings New hire employee satisfaction ratings % of voluntary turnover every month

	KPIs (lagging indicators)	Leading indicators
Customer service	Reduced average case-handling time	<i>% of cases closed on first contact</i> <i>% of repeated cases</i> <i>% of customer agents who received training</i> <i>% of unresolved cases every week</i>
	Improved customer and agent satisfaction	<i>% of agents who completed training</i> <i>Adoption rate of fulfillment processes</i> <i>Attrition rate of customer agents</i> <i>% of cases closed on first contact</i>
	Improved self-service adoption	<i>Self-service abandon rate</i> <i># of Knowledge articles</i> <i>% of consumers who are aware of self-service</i> <i>% decrease in support calls per week</i>



More metrics don't equal to better metrics. Take an agile approach to continuously improve on a small set of metrics. Start with an MVP list of most important KPIs and leading indicators, preferably no more than three for each stakeholder group. Build a cadence to review these metrics regularly with stakeholders. Use the below questions to evaluate:

- Are we tracking the right activities to judge whether we are on-track or off-track?
- Are there any metrics that have not helped make course correction decisions? Why?
- Are we covering what each stakeholder group needs to track to inform their decisions and actions?

Refer to ServiceNow's [Performance Analytics content pack](#) for a list of indicators you can consider using for analyzing performance your ServiceNow implementations.

Step 2b: Define ServiceNow platform adoption KPIs

Define 'adoption KPIs', with clear targets and leading indicators, that help measure how successfully ServiceNow is being adopted in your organization.

Check your progress:

- Do you have metrics to track adoption of ServiceNow platform and applications?
- Do you have adoption targets defined based on a ServiceNow implementation plan?

If you answered "yes" to both questions above, proceed to the [next step](#). If not, complete these action steps to complete this step:

1. Define ServiceNow platform and application adoption KPIs.

Work with your ServiceNow platform team and application owners to identify the most critical KPIs (no more than 3) based on the level of adoption and usage required to achieve the expected business outcomes. Examples include:

- **# of unique users migrated to platform** – Measures how many users have started to use the Now Platform (adoption)
- **# of processes migrated to platform** – Measures how many processes have migrated to use the Now Platform (adoption)
- **Average # of daily uses** – Measures how much the processes on the Now Platform are being used (usage) Below are examples of KPIs ServiceNow customers typically use:



Consider having a separate set of adoption KPIs for individual ServiceNow applications and the ServiceNow platform. The more scoped your metrics are, the easier it will be for your stakeholders to identify and resolve adoption issues.

2. Define adoption KPIs targets.

Adoption KPIs are often subject to variability across applications, geographies, and functions. Work with process owners, service owners, and managers of fulfiller teams to clearly state the adoption targets you need to reach deliver the business outcomes you expect from ServiceNow. This way, you're continually making progress toward your business outcomes.

Here are a couple of examples:

- If your target is to reduce average case-handling times by 10%, what's the *minimum* number of customer service agents who need to adopt ServiceNow for you to hit this target?
- If your target is to increase the number of cases resolved through self-service by 10%, how many employees or customers need to transition to self-service to reach the goal?

You can use data from your initial pilots to create a rough estimate for adoption targets you need to see across your implementation phases.



3. Set **leading indicators** for your adoption KPIs.

Adoption KPIs are also lagging in nature, i.e. they take time to influence and are not subject to variability in short-term. You need to have leading indicators that inform activities like [Organizational Change Management \(OCM\)](#) and trainings to help increase adoption. Work with your OCM and platform team leads to discuss:

- What short-term activity milestones are critical in realizing the adoption KPIs targets? For example: % of process users trained on ServiceNow is critical to increase the average number of unique users on ServiceNow applications
- Would tracking the short-term activity provide enough information to course correct in future if performance is poor?
- What other metrics should we track to predict and influence platform adoption?

Define at least three leading indicators that the ServiceNow platform team and application owners can use to track progress towards adoption targets.



OCM (organizational change management) is critical to driving adoption of ServiceNow platform across the organization. Define your adoption metrics/goals and OCM activities as part of your ServiceNow implementation planning, instead of waiting for the implementation to complete.

Step 2c: Define KPIs to measure Now Platform health

Now Platform® health is critical to minimizing technical debt, maintaining performance, and delivering continuous value to your organization. Put well-defined guidelines in place to maintain platform health. Make those guidelines measurable with KPIs that stakeholders can consistently review and act upon.

The key categories where you should have KPIs defined are ease of upgrade, performance, ease of management, security, and user experience. HealthScan, ServiceNow's automated instance scanning system, helps quickly scan your ServiceNow instance and gives you data points across five key categories.

Check your progress:

- Are you using ServiceNow HealthScan regularly to assess ServiceNow instance health?
- Do you have targets defined for each platform health category: ease of upgrade, performance, ease of management, security, and user experience?

If you answered "yes" to both questions above, proceed to the [next step](#). If not, complete these action steps to complete this step:

1. Define KPIs to measure how easy it is to upgrade.

Customers get the most value from their ServiceNow instance when they upgrade to new releases and adopt new capabilities, so you'll need KPIs to measure how easy your upgrades are. Here are some examples:

- **Complete upgrade activities within three weeks every time** – This KPI helps developers avoid unnecessary customizations that will require extra testing or review during upgrades.
- **Work with your ServiceNow platform team to create some leading indicators** – These will help ServiceNow developers assess how the new features and functionalities they're developing can impact ServiceNow instance's upgradability. Some examples to consider:
 - Number of baseline functions changed that affect upgradability
 - Percentage of customizations with clear business value and no out-of-the-box alternative
 - Number of deprecated APIs in use
 - Number of changes that require extra testing before or as part of the upgrade

Make your ServiceNow development community aware of these KPIs and their associated leading indicators. Refer to the Upgrade Easily page for anything you need to know about ServiceNow instance upgrades and all related resources.

2. Define KPIs to measure performance and ease of maintenance.

You need KPIs to measure the quality and reliability of the ServiceNow instance, such as:



- % uptime – Measures the percent of time when the Now Platform is in operation, providing an indicator of how reliable your platform is
- Mean time to repair (MTTR) – Measures the average time it takes to repair the platform when it goes down, providing a basic measure of how maintainable and repairable your platform is
- % of incidents resolved within service level agreements (SLAs) – Measures how reliably you can restore services on the Now Platform within the time limits you set with platform users in your SLAs

Have targets and SLAs defined for each KPI you track to inform prioritization. Work with your ServiceNow support team to define a small set of leading indicators. Here are some examples to consider:

- Percentage of scripts following the organization's technical implementation guidelines
- Time taken to query a report
- Time taken for forms to load
- Percentage of administration issues (such as wrong admin role assigned)

Schedule performance management and maintenance tasks that you can put in place on a daily, weekly, monthly, and quarterly basis. For more details, refer to the recommendations made by the ServiceNow Cloud Operations team to [simplify instance maintenance](#) and our Success Playbook on [ServiceNow instance performance administration](#).

3. Define KPIs to measure security.

You must have KPIs to measure security, so you stay compliant with your organization's critical security controls. A simple example is:

- **Maintain 90% compliance with critical security controls** – This will occur at an aggregate level of performance on all security-related system properties and plugins on the Now Platform.

Make sure you have targets defined for each KPI. Also work with your ServiceNow platform security team to define a small set of leading indicators to track progress. Some examples to consider:

- Percentage of properties set appropriately
- Is the high-security plugin enabled
- Usage of access control rules
- Percentage of administration issues (such as wrong admin role assigned)

Use the [Instance Security Dashboard](#) to communicate these KPIs and related metrics such as **number of non-compliant items**.

4. Define KPIs to measure user experience.

The most common KPI used to measure user experience is the **CSAT (Customer Satisfaction Score)**. While the CSAT is among the best methods to quantify user experience, you must have some leading indicators to track smaller task-level goals that impact the CSAT at an aggregate level. Consider these examples:

- Length of forms that users need to fill
- Feedback on how helpful the left navigation bar is
- Time taken to place an IT request, such as a new laptop

Work with your internal user experience team to identify the small set of metrics you could use to show how your ServiceNow user experience is impacted.

For additional details on what makes a good experience, refer to our Success Playbook on [improving self-service with ServiceNow](#).



Use [ServiceNow HealthScan](#) regularly and define KPIs on the score received

Many successful ServiceNow customers take the ServiceNow HealthScan every quarter and define KPIs like "maintain at least 80% score across all categories." This way, customer make sure they're not missing out on some important checks and are able to make timely remediation steps based on the HealthScan recommendations.

Step 3a: Build performance dashboards using ServiceNow Performance Analytics

Your next step is to build dashboards that show performance trends based on the KPIs you defined in step 2. The best dashboards are customized, so they include only relevant metrics, using the right visualizations (daily change view versus aggregate view, for example) to help users, such as the ServiceNow stakeholders viewing the dashboard, to make quick, informed decisions.

Check your progress:

- Do you know exactly what metrics and visualizations each ServiceNow stakeholder group is interested in?
- Do you know how to configure ServiceNow Performance Analytics to create dashboards customized to stakeholder needs?

If you answered “no” to the questions above, complete these action steps:

1. Gather requirements for building the ServiceNow performance dashboards.

The information you include in the dashboard must follow the data, trends, and visualizations the stakeholders viewing the dashboard require to make informed decisions. Revisit the stakeholder analysis you did in step 1a and map out the stakeholder groups with the KPIs they’re most likely interested in tracking and using. Also make an initial assessment on what type of data visualizations they may need to make decisions. Work with one or more representatives of each stakeholder group to build an initial list of requirements for creating ServiceNow performance dashboards. Use these questions to get started:

- What metrics are you interested in staying informed of? What are the top three metrics most important to you?
- How frequently would you like to see reports on these metrics?
- What types of analyses are you most interested in? These might be looking at average value or correlation with other metrics, for example.
- How will you use this dashboard? For example, to review during team meetings or possibly to inform individual work?

Follow an agile approach to build requirements for the dashboard. Start by building a minimum viable product (MVP) dashboard and evolve it as your stakeholder needs for metrics change and visualizations in the dashboard evolve.

2. Learn about the ServiceNow Performance Analytics features and capabilities.

Use [ServiceNow Performance Analytics](#) to build ServiceNow performance dashboards—it helps measure performance in real time, it already has OOTB dashboards optimized for ServiceNow workflows, and it’s secure since data stays in the platform. Follow these steps to get started:

- a) Familiarize yourself with [ServiceNow Analytics, Intelligence, and Reporting solutions](#) and what’s available OOTB. Keep in mind that the OOTB content varies according to your ServiceNow release version and the [version of Performance Analytics](#) you purchased.

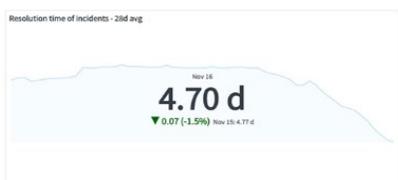


b) Review the visualization widgets available to configure custom dashboards. Here are a few:

Visualizations

What are they used to show

Single score widget



- **Show directional change** – Use the single score widget to show an increase or decrease in a KPI performance compared to the previous period. You can configure it to reflect whether a higher value represents a positive or negative change.
- **Aggregate intervals based on audience** – You can configure a single indicator to calculate the different aggregation periods that are tailored to separate audiences. One consumer might want to see a 28-day running average while another wants a monthly average.

Time series widget



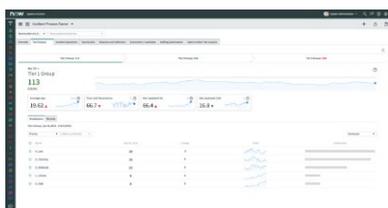
- **Highlight seasonality** – Time series widgets are based on indicators that measure volume on a single day to assess frequency and distribution over time. These widgets help you expose recurring trends so you can plan ahead. For example, if Fridays historically have the heaviest intake of new requests, you might want to have additional staff on hand to process the increase in volume.
- **Indicate correlation** – You can also use a time series widget to plot related KPIs on the same chart to drive visual correlations of trends.

Breakdown widget



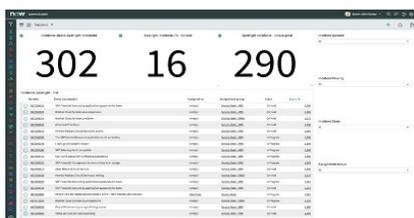
- **Perform segmentation** – Using a breakdown widget provides insight into the specific elements that contribute to the KPI score. Breakdowns can be used to segment the data into different buckets or groups so you can uncover bottlenecks or areas for improvement.
- **Show proportion** – The breakdown widget is critical for seeing proportional scores. You can compare how the different breakdown elements affect the overall indicator score over time by stacking or grouping the results.

Workbench widget



- **Monitor an end-to-end process** – Use this widget to tell a story or monitor an end-to-end process through a collection of related metrics. Instead of using filters, breakdowns, and multiple tabs for a complex dashboard, a workbench widget shows leading and lagging indicator scores across different stages of a workflow with a single view.

Spotlight widget



- **Highlight metrics that help prioritize work based on weighted or indexed criteria** – A spotlight widget lets you prioritize work based on weighted or indexed criteria, so users can focus on tasks that have the most impact on an indicator. For example, incidents that have been open for many days or that have been reassigned multiple times might cause an SLA breach. Spotlight lets you highlight those considerations when prioritizing work.

c) Consider taking Performance Analytics [essentials](#) and [fundamentals](#) training courses to gain a deeper understanding.

Note that [Performance Analytics](#) ships with the most common KPIs for measuring your IT, customer service, and HR service delivery processes to help you get started as quickly as possible. These KPIs are available in content packs that create the visualizations on your screen using configuration items. Make sure you select the KPIs relevant to your environment and stakeholders.

3. Configure custom dashboards on ServiceNow Performance Analytics.

Follow instructions from the Now Community documentation for [Getting Started with Performance Analytics](#) to configure custom dashboards based on the requirements of each stakeholder group. Use the below checks to ensure the dashboard you create is relevant and informs decisions:

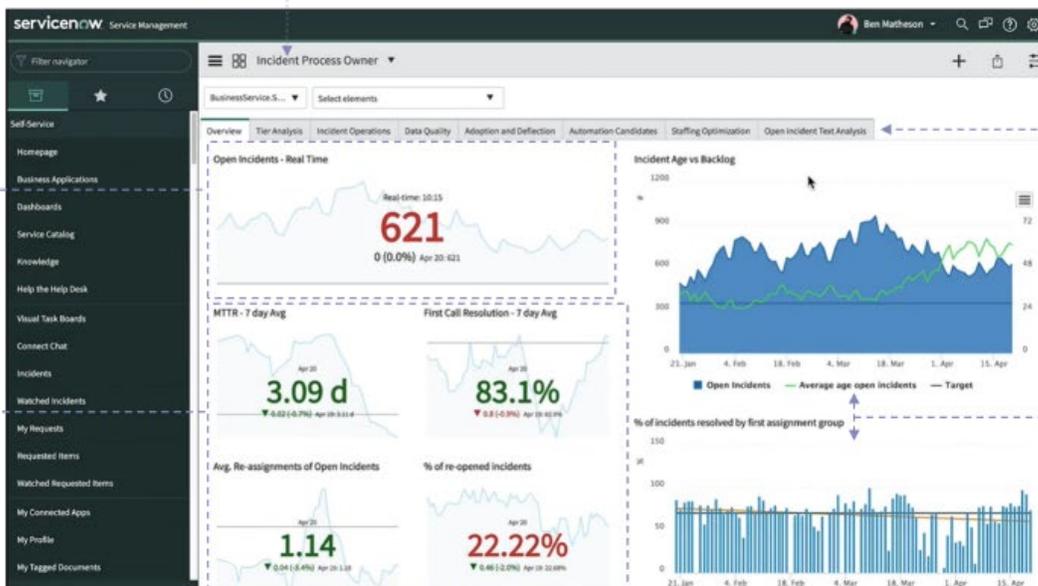
- **Do we clearly indicate who the dashboard is designed for?** Ideally, you should have a clear audience in mind (platform owner, service owner for example) while creating a dashboard so you can customize it based on their preferences. Highlight who the key audience is on the dashboard so other stakeholder groups visiting the dashboard have the right context for the information presented.
- **Have we administered the dashboard accurately?** Consider impersonating as a user to validate whether you're providing the right permissions, especially the admin right.
- **Do we display the targets and thresholds for important metrics?** Stakeholders appreciate the ability to visually assess performance using the dashboard. Use visual cues whenever you can to show when metrics are meeting targets so they can quickly recognize whether they're on or off track. For example, you might have metrics that are performing poorly display in red).
- **Do we minimize clutter to maintain focus on the most important metrics?** Including more metrics will not help stakeholders get more value. Focus the dashboard to highlight the most important information, using the right visualization. When needed, allow stakeholders to explore related metrics and see further breakdowns.
- **Do we have at least one metric for each stakeholder group that will be using the dashboard?** Typically, more than one stakeholder group will be using the dashboard. Know who those users are and if you're including relevant information for them.
- **Have we included the right definitions?** Include the right correct indicator source and breakdown source definitions.

This screen shot is an example of how to lay out information in a custom dashboard built OOTB on ServiceNow Performance Analytics:

Clearly label who the dashboard is designed for.

Place the most important information at the top.

Place secondary supporting information below.



Offer filters so your stakeholder can explore deeper into metric performance when needed without cluttering the dashboard (when it's technically feasible).

Include at least one metric for each of the key stakeholder's interest (e.g., Incident close rate versus assignments for the process owner.)

4. Build a plan to evolve your ServiceNow dashboards.

Develop a regular cadence to conduct an in-depth review of all ServiceNow performance dashboards and improve them. Look for changes in stakeholders' data needs, effectiveness of current metrics, effectiveness of the dashboards in supporting decision-making, and administration issues. Consider asking your stakeholders these questions:

- Are the metrics included in the dashboard still useful? Are there any that you don't use and are of no value on the dashboard?
- Do we need to highlight a different set of trends or data points to support your goals for the next quarter or year? What are they?
- Are you able to make informed decisions using the dashboard? What additional data points would you like to see that will support your decision-making?
- Are there any additional data points that they would like to track? Why?
- Do I have the right set of stakeholders included as users for this dashboard? Are there any who should not have admin access to the dashboard?

Consider using a mix of different techniques to get answers to these questions. These techniques could include feedback surveys, interviews, usage data, or focus group exercises.

Based on answers to the questions above, work with your platform team to identify the right mitigation steps. Here are some potential mitigation steps you might identify:

- Training and educating stakeholders on using performance analytics solutions
- OCM to help stakeholders include metrics in their decision-making approach
- Simplifying the experience—by potentially creating a new, custom dashboard—for stakeholders who aren't getting value from current dashboards
- Resolving any administration or maintenance issues that impact adoption



*"I started the conversation with stakeholders saying, 'Forget the layout! Let's talk about the data that matters to you. What do you need to do? What decisions do you need to make? What is it you're hoping to accomplish that the dashboard will help you with? What are the questions you want the dashboard to help you ask? What are the things that you want the dashboard to answer?' Taking this approach helped me **position the dashboards as something you work from, not just look at.**"*

— A ServiceNow platform owner



Foster a culture of data-driven decision-making

In a data-driven culture, stakeholders across the organization look for data to make decisions—from senior leaders to front-desk workers. There's clear ownership for metrics to safeguard that data is accurately captured and is comprehensive so it's most useful for decision-making.

If Performance Analytics is new for your organization, you can take these steps to build a data-driven culture:

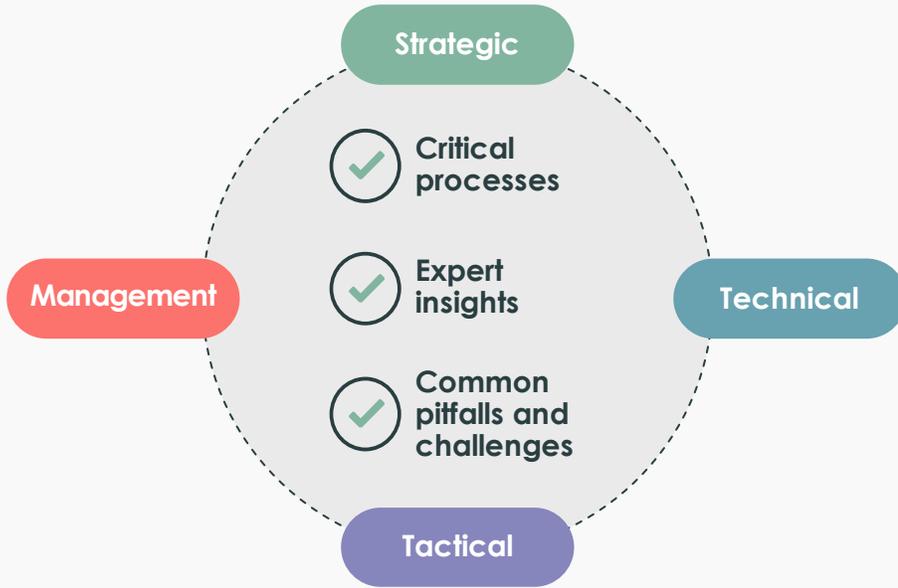
- **Educate ServiceNow stakeholders on using metric and data to inform decision-making** – Build a training curriculum for ServiceNow users and include instructions on how they can use metrics in their daily work using ServiceNow Performance Analytics. Focus your training on use cases that happen every day and tell success stories from those who've used metrics successfully. Remember—each time you expand ServiceNow to new fulfiller populations, you must deliver this training.
- **Encourage the use of [thresholds](#)** – With Performance Analytics, you can set thresholds, which define a normal range of scores for an indicator and alert you when certain events occur, such as when a score reaches an all-time high or low.
- **Define playbook to guide stakeholder actions** – Create playbooks that guide how your team should respond when a threshold is hit, especially for the leading indicators you define. The playbook should include step-by-step action steps detailing how the team should respond when a leading indicator crosses a threshold and indicates a problem. For example, for the leading indicator "number of fulfiller trainings completed," the playbook may include steps like intervention by the executive sponsor with fulfiller managers, better OCM communications that emphasize the importance of training, or simply adding more training sessions to the calendar.
- **Build metrics ownership** – Metrics must have a clear owner (typically a team), so it is easy to know who is responsible for the next steps or actions required when a threshold is hit. This is critical—without clear ownership, metrics can quickly become no one's responsibility. These metrics shouldn't be tracked because they add no value.

Customer Success Best Practices

ServiceNow's Best Practice Center of Excellence provides prescriptive, actionable advice to help you maximize the value of your ServiceNow investment.



Definitive guidance on a breadth of topics



Designed for:

-  Executive sponsors
-  Platform owners and teams
-  Service and process owners

Created and vetted by experts



Best practice insights from customers, partners, and ServiceNow teams



Based on thousands of successful implementations across the globe



Distilled through a rigorous process to enhance your success

Proven to help you transform with confidence



Practical



Actionable



Value-added



Expert-validated

Get started today.

Visit [Customer Success Center](#).

Contact your ServiceNow team for personalized assistance.